North Dakota State University

Departmental Position and Org Charting Guide

Human Resource/Payroll & Budget
How-To Guide

HR/Payroll Office
January, 2011

Table of Contents

Human Resources/Payroll Contact Guide

SGC 102
Fax Number (701) 231-9686
www.ndsu.edu/hr

Appointments are recommended in order to provide employees with the best possible service.

Paulette Schlecht - Office Assistant   (701) 231-8961
    E-mail: ndsu.hr@ndsu.edu
    Receptionist, Frontline Leadership, schedule appointments for Human Resources/Payroll
    staff, sell movie tickets, non-benefitted hire paperwork.

Allyson Aakre – Employment Records Technician   (701) 231-5678
    E-mail: Allyson.Aakre@ndsu.edu
    Process 8000/9000 job bands and GRA/GTA hiring & change forms, seasonal status, time slips.

Sheila Boyda – Employment Records Technician   (701) 231-5657
    E-mail: Sheila.Boyda@ndsu.edu
    Process benefited hiring and change forms, leave slips, and benefited change forms.

Colette Erickson – Associate Director of HR   (701) 231-8788
    E-mail: Colette.Erickson@ndsu.edu
    Salary administration, policy interpretation, recruitment/selection process, Responsibility
    Review process, job family assignment, PeopleSoft HRMS security access.

Kate Fluge – Records Specialist   (701) 231-6293
    E-mail: kate.fluge@ndsu.edu
    Manage HR/Payroll employee records, employment verifications, calculate taxable expenses,
    faculty/staff tuition waivers & employee spouse/dependent discounts, departmental billings

Laura Garske-Hermanson – International Payroll Specialist   (701) 231-7328
    E-mail: Laura.Garske-Hermanson@ndsu.edu
    International employment eligibility, direct deposit.

Tara Hoyme - Payroll/Benefits Specialist   (701) 231-7543
    E-mail: Tara.Hoyme@ndsu.edu
    Balance and process benefits deductions.

Tricia Johnson – Associate Director of Payroll   (701) 231-8990
    E-mail: Tricia.Johnson@ndsu.edu
    Manage payroll process, W-2's, paycheck adjustments, off cycle checks

Shelly Lura - HR Employment Assistant   (701) 231-5677
    E-mail: Shelly.Lura@ndsu.edu
    Recruitment assistant.

Kari Schmitz-Eilertson – Payroll Specialist   (701) 231-6251
    E-mail: Kari.Schmitz.Eilertson@ndsu.edu
    Kronos electronic timekeeping system, wage garnishments.

Jill Spacek – HR Administrator   (701) 231-8525
    E-mail: Jill.Spacek@ndsu.edu
    Recruitment process, grievance coordination.

Brittnee Steckler— Benefits Coordinator   (701) 231-8965
       E-mail: Brittnee.Steckler@ndsu.edu
       Benefits administration; coordinate Responsibility Review process and New Employee
       Orientation; shared leave, FMLA, military leave, ADA accommodations contact.

Liz Thompson – HRMS Technician   (701) 231-5922
       E-mail: Elizabeth.Thompson.1@ndsu.edu
       HRMS PeopleSoft contact, assist with salary administration.

NDSU Budget Office Contact Guide
SGC 112
Fax Number (701) 231-9787

Aubrey Ketterling – Budget Specialist   (701) 231-8204
      E-mail: Aubrey.Ketterling@ndsu.edu

Cynthia Rott - Interim Budget Director   (701) 231-7458
      E-mail: Cynthia.Rott@ndsu.edu

Evelyn Sova – Budget Analyst   (701) 231-8571
      E-mail: Evelyn.Sova@ndsu.edu

Ag Budget Office Contact Guide
Morrill 301
Fax Number (701) 231-7510

Jim Swank – Associate Budget Director   (701) 231-7719
      E-mail: Jim.Swank@ndsu.edu

David Ruhland – Director of Ag Budget Office   (701) 231-6408
      E-mail: David.Ruhland@ndsu.edu

Ona Vig – Grant & Contract Officer   (701) 231-8528
      E-mail: Ona.Vig@ndsu.edu

Leann Frieler - Accountant   (701) 231-8108
      E-mail: Leann.Frieler@ndsu.edu

Rhonda Holzer – Account Tech   (701) 231-8118
      E-mail: Rhonda.Holzer@ndsu.edu

Kate Pemberton – Account Tech   (701) 231-7739
      E-mail: Kate.Pemberton@ndsu.edu

The duties of the NDSU Budget Office and Ag Budget Office include the funding and budget portions of payroll forms. They are responsible for processing funding changes, budget adjustments and retroactive distributions in relation to payroll. They are also responsible for the activation and/or inactivation of combination codes in HRMS. Please contact someone in the appropriate Budget Office for assistance.

ORGANIZATIONAL DEVELOPMENT

Maintain Positions/Budgets

Add/Update Position Information

Organizational Development>Position Management>Maintain Positions/Budgets>Add/Update Position Info

Enter your Department Number. Hit search button. All the department positions appear. Shows:

- Position Number
- Description (Functional Title)
- Position Status
- Business Unit (always NDSU1)
- Department Number
- Job Code
- Reports to Position Number

Or you can just select a position number: 00021481   Hit Enter

Click on tab: **Description**

Position Information:
- Indicates if the position is filled or if it is vacant
- Indicates whether it is a position that allows multiple incumbents - 1 out of 9999 (pool) or a single incumbent - 1 out of 1
- Indicates status of the position (active or inactive)
- Title of the position
- Who the position reports to – only for benefitted employees

Job Information
- Job Code (Job Family is the first 4 digits of the job code)
- Regular/Temporary status
- Full-time or Part-time position
- FLSA status: exempt/nonexempt EX = exempt or NE = nonexempt at the end of salary plan
- Standard hours
- Reports To

Work Location
- What department the position is in
- Location of the position

Click on tab: **Specific Information**

- This tells you the number of people in a position
- FTE

Click on tab: **Budget and Incumbents**

- Indicates 'who' is in the position (if it is not vacant).

Ignore the Current Budget box, it does not have correct data. The correct budget information follows on Page 16.

Review Positions/Budget Information

Position History

Organizational Development>Position Management>Review Position/Budget Info>Position History

This screen will show the history of the position.

Vacant Budgeted Positions

Organizational Development>Position Management>Review Position/Budget Info>Vacant Budgeted Positions

Enter your Department Number. Hit Search button.

This will bring up a list of positions that have vacancies in them: Regular and Temporary.

SET UP HRMS

Combination Code Table

Combination codes are the funding sources that are used in HRMS for salary, deductions and taxes. They consist of the Business Unit, Fund, Department, Project/Grant (if applicable), Program Code (if applicable), and Account.

The Business Unit for NDSU is the letter S and it is the first character in the Combination Code.

The Account is also represented by a letter within the Combination Code as shown in the table below:

GL Account	Description	Letter	Use
511002	Salary – Regular Benefited	R	Use for all Benefited employees that are not considered faculty
511005	Staff Overload	S	Use for overload for group indicated above
512005	Salary – Other	O	Use for all time slip employees not employed by Ag or Forest Service
513005	Temp Salaries – Non Benefited	T	Use for time slip employees employed by Ag or Forest Service
514005	Overtime	V	Use for overtime (all employees)
515005	Salary – Faculty	F	Use for all faculty (including Part-Time Academic Staff)
515015	Salary – Non-Teaching Faculty - Extension Service	E	Use for 2000 band employees in the Extension Service that do not teach
515010	Faculty Overload	P	Use for overload for 2000 band employees
517005	Salaries – Graduate Assistants	G	Use for graduate students

An example of a Combination Code:

Business Unit	Fund	Department	Project/Grant	Program Code	Account
NDSU1	43500	7690	FAR0004080	04401	515005

As mentioned the Business Unit is represented by the letter S and the Account will be represented by the letter F. The Program Code will drop the leading number and will be identified by the last 4 digits. The result is the following (with spaces for clarity):

S 43500 7690 FAR0004080 4401 F

On any of the HRMS screens this would appear as the following:

S435007690FAR00040804401F

To see if a funding source is set up in the HRMS system you can look at the Combination Code Table. The Combination Code table is found at:

Set Up HRMS>Product Related>Commitment Accounting>Budget Information>Combination Code Table

The screen should look like this:

To search for a combination code, enter your information in the appropriate boxes and click on search. NDSU1 should always be entered in the SetID field when searching for a combination code. If you use the Account field in your search use the 6 digit number instead of the letter at the end of the combination code. If there is a program code in the combination code, use all 5 digits in the search.

After searching you should see either the combination code string that you are looking for or "No matching values were found." If you receive the message that nothing matched your search the combination code string may not be set up in HRMS or you may have some incorrect information in your search. Contact the appropriate Budget Office to set up the combination code or for help in determining why your search returned no results.

Once you have the combination code string you are searching for you can click on it to see details including effective date(s) and active/inactive status.

https://www.connectnd.us/psp/ndhp/EMPLOYEE/HRMS/c/DEFINE_COMMIT_ACCOUNTING_US.VALID_COMBO_TABLE.NA?PORTALPARAM_PTCNAV=HC_VALID

File   Edit   View   Favorites   Tools   Help

Favorites | Combination Code Table

ORACLE   You are on Database: NDHP

Favorites | Main Menu > Set Up HRMS > Product Related > Commitment Accounting > Budget Information > Combination Code Table

Combination Code Table

SetID: NDSU1

GL Combination Code: S307423140R

Combination Code Detail	Find	View All First ◄ 1 of 1 ► Last

Effective Date: 01/01/1901   Status: Active

Description: HUMAN RESOURCES

Short Desc: HUMAN RESO   ☑ Valid Value

ChartField Detail

Account :	511002
Department :	3140
Project/Grant :	
Product :	
Fund Code :	30742
Program Code :	
Class Field :	NDSU1
Affiliate :	
Operating Unit :	
Alternate Account :	
Budget Reference :	
Chartfield 1 :	
Chartfield 2 :	
Chartfield 3 :	

Save   Return to Search   Previous in List   Next in List   Notify   Add   Update/Display   Include History

Department Budget Table

The Department Budget Table shows all information related to funding and budgeted amounts for a position. The Department Budget Table is found at:

Setup HRMS>Product Related>Commitment Accounting>Budget Information>Department Budget Table USA

The screen will look like the following screen:

To search enter your department number and the current fiscal
You should receive information that looks like the following screen:

If you searched by your department you should be able to click on any of the positions to see the details for that position. If you searched by position number to begin with it should take you directly to the screen with the details for that position.

The details for the position are on the second tab titled "Dept Budget Earnings". The circle at the top of the screen shot shows the department number this position is set up in. The red box on the screen shot shows the position number and title. The next red circle shows the most recent effective date for any changes to funding or budgeting for this position.

The information under the blue bar labeled "Earnings Distribution" is what you will want to look at for funding and budgeting purposes. The Combination Code field shows the Combination Code that is set up to be used on this position. There will either be a budgeted amount or a distribution percentage listed for each position. If there is more than one funding source you will need to select View All on the Earnings Distribution bar in order to see all of the funding sources.

Some employees may have more than one Department Budget Table set up for them. One Department Budget Table will be set up for the position, as indicated in the previous pages. The other Department Budget Table will be set up at an "Appointment" level.

On the search page you can enter your department number, the current fiscal year and change the drop down for Budget Level to "Appointment". After clicking search you should see a list of all the Department Budget Tables for your department that are set up for specific employees. In the list that is returned you should see Empl ID and Empl Rcd Nbr instead of position numbers.

On the Earnings tab the same information will appear with the exception of the position number. Instead of the position number and title the Empl ID, Empl Rcd# and Employee name will appear instead.

Funding Summary USA

Set Up HRMS>Product Related>Commitment Accounting>Reports>Funding Summary USA

Set up Run Control ID

Run for either appt or position level

If an employee has a Department Budget Table set up at the Appointment Level that will override the Department Budget Table set up at the Position Level.

Funding Summary Report

The Funding Summary Report shows information related to funding and budgeted amounts for all positions in a department. The report can be used to proof funding sources and budgets that are currently set up to be used for employees. This report will show the same information as the Department Budget Table without having to go into each individual DBT. The Funding Summary Report is found at:

Setup HRMS >Product Related>Commitment Accounting>Reports>Funding Summary USA

Setup Run Control ID

When running the report you will need to use the following criteria:

SetID: NDSU1
Department: home department number of position
Fiscal Year: current fiscal year
As Of Date: can be current or a specific date
Funding Summary By: Position Level
Report Option: Earnings

Once the report has run the PDF will look like the example below:

As mentioned in the section about Department Budget Tables there are some DBTs set up by appointment level. The report may need to be run again using the Funding Summary By: Appointment Level rather than Position Level in order get a complete picture for the department.

ORG CHARTING WITH ORG PLUS

All employees that have the Department Admin security role will automatically be assigned access to Org Plus. Once you have been given security to the Org Plus module you will receive an e-mail with your username and password. If you have any errors or questions when you are viewing your Organizational Chart, please contact the HR/Payroll office.

You will then be able to see the HE OrgPlus Login option on the menu, see below:
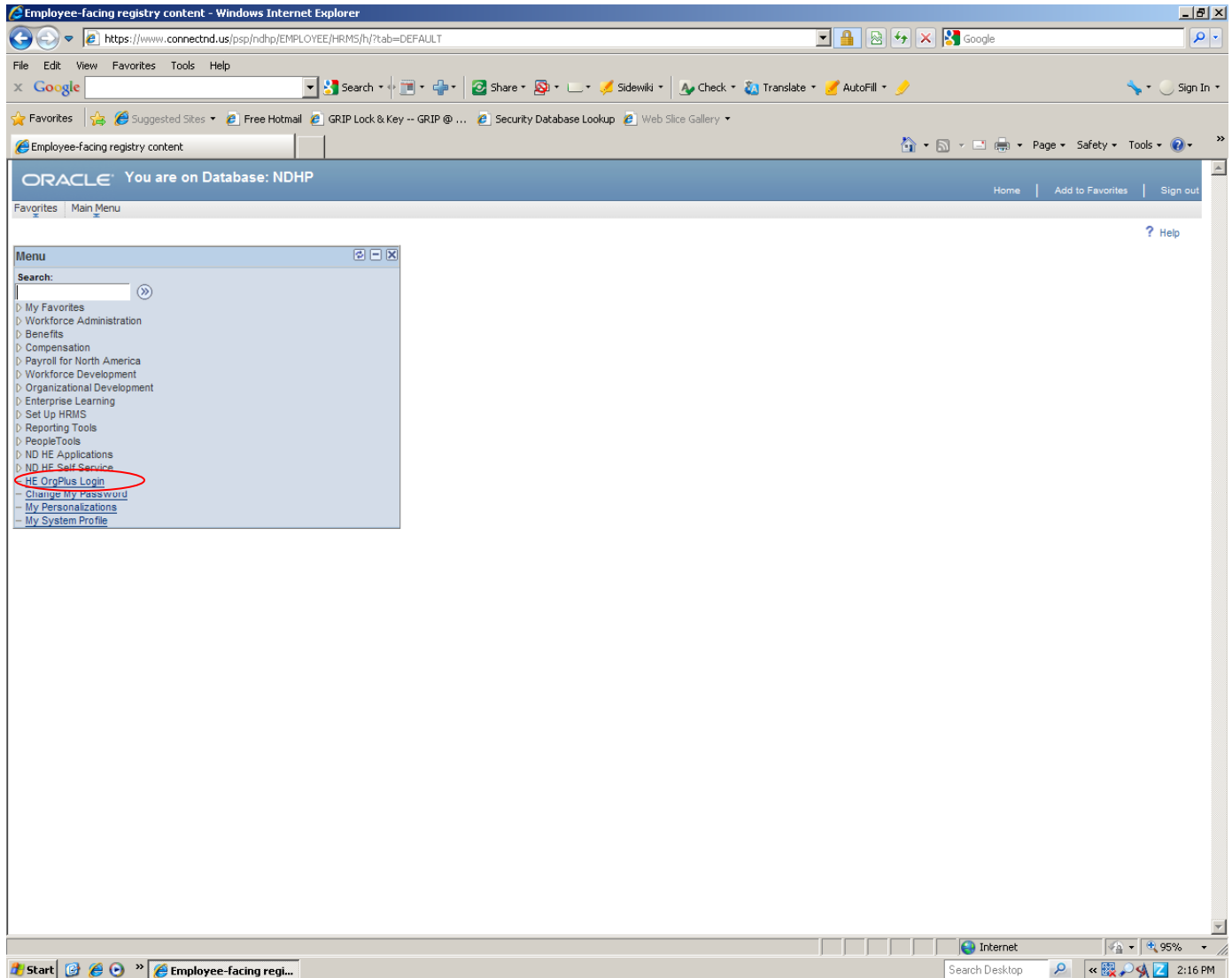
Click on the HE OrgPlus Login menu option to log into OrgPlus.
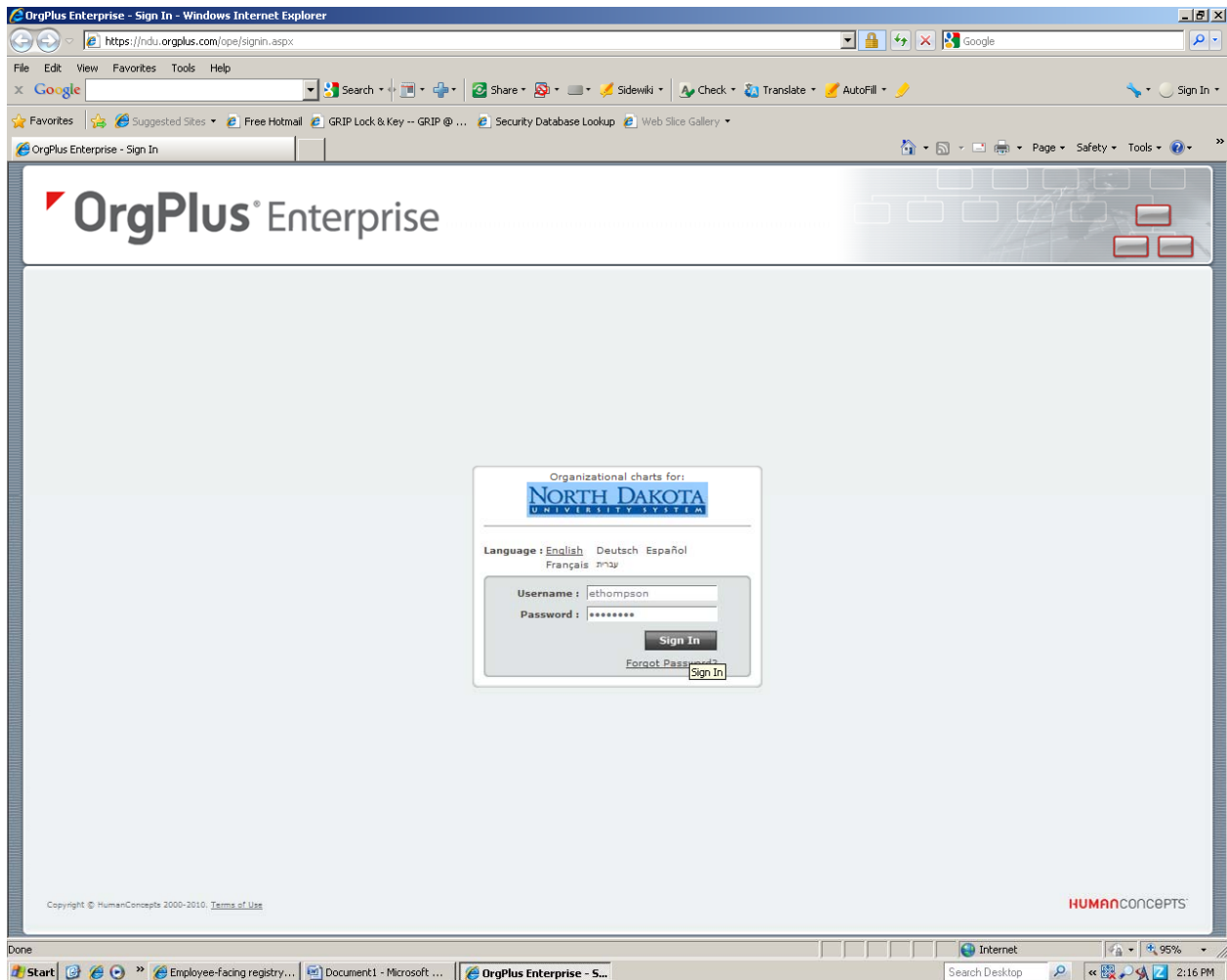
The first time that you log into HE OrgPlus it will prompt you to change your password, after changing your password, you will see the screen below:
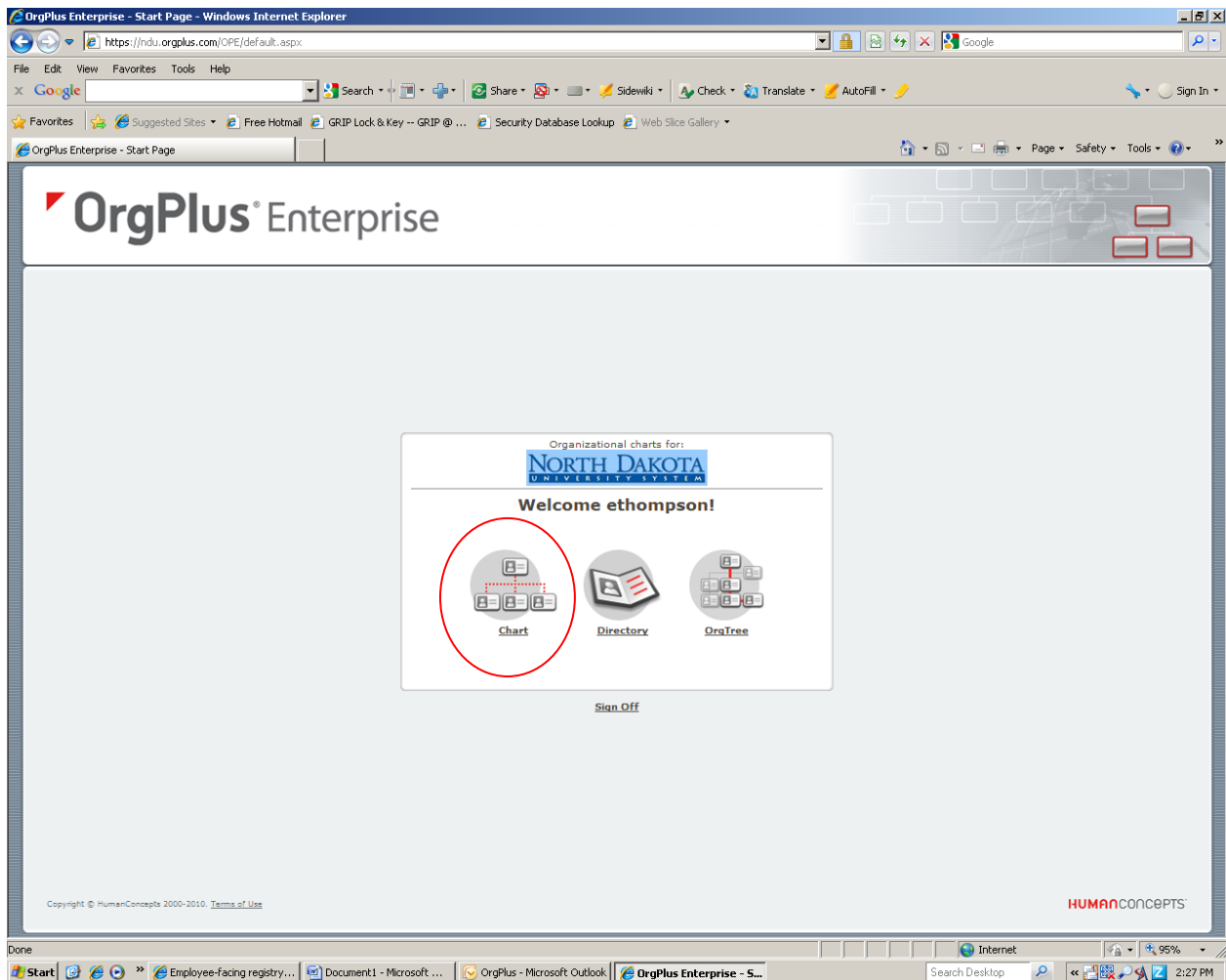
Org Plus Enterprise allows for department org chart viewing for division, department or area, depending on your access.

Click on the Chart icon.

To change your password at any time in the future, you will click on your name in the upper right corner it will drop down the Change Password option.
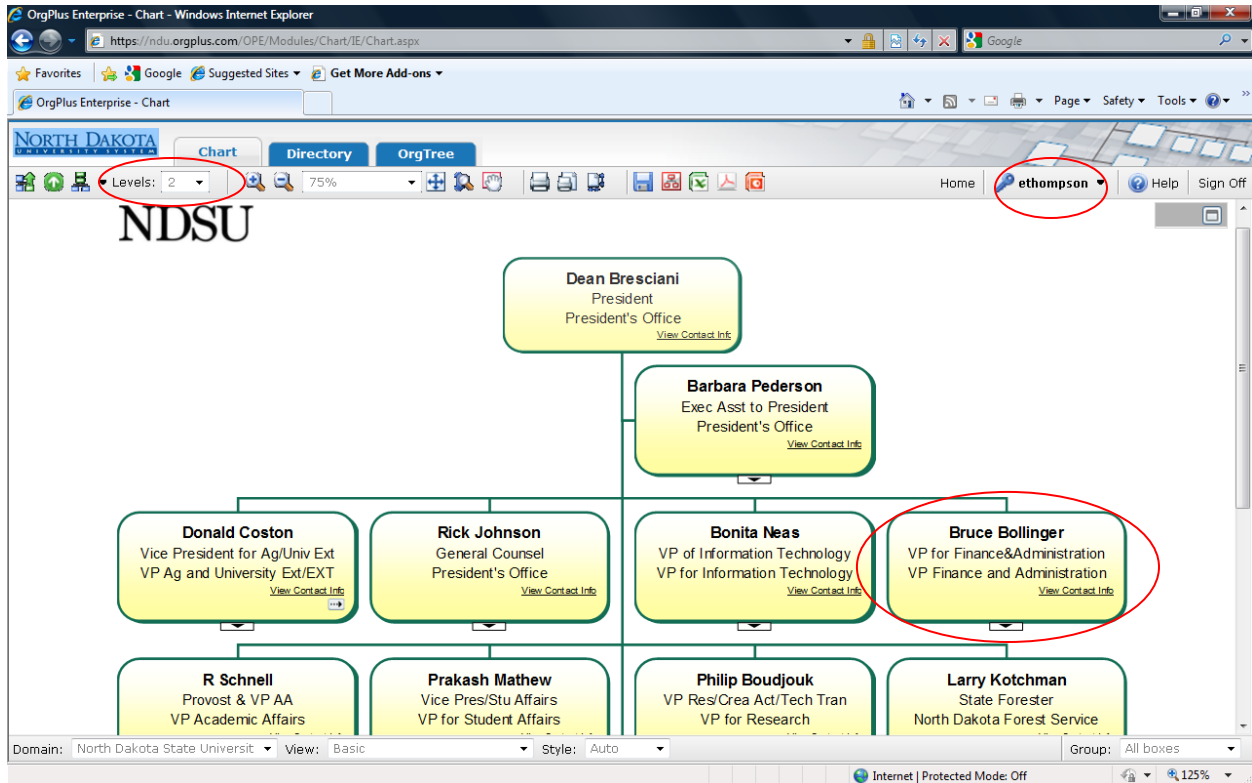
It will bring up the Organization Chart for your Department and two levels above the Supervisor of your Department.

If you want to see the contact information of anyone on the Organizational Chart move your mouse over the hyperlink and it will display that information. See below:

You can export the Org Chart to Excel, PDF format, or PowerPoint by clicking on the corresponding button:

You can expand /collapse your view by clicking on the Expand/Collapse button:

When you expand it gives you that employees' information.

The directory view allows for searching for a particular employee or a particular job title.
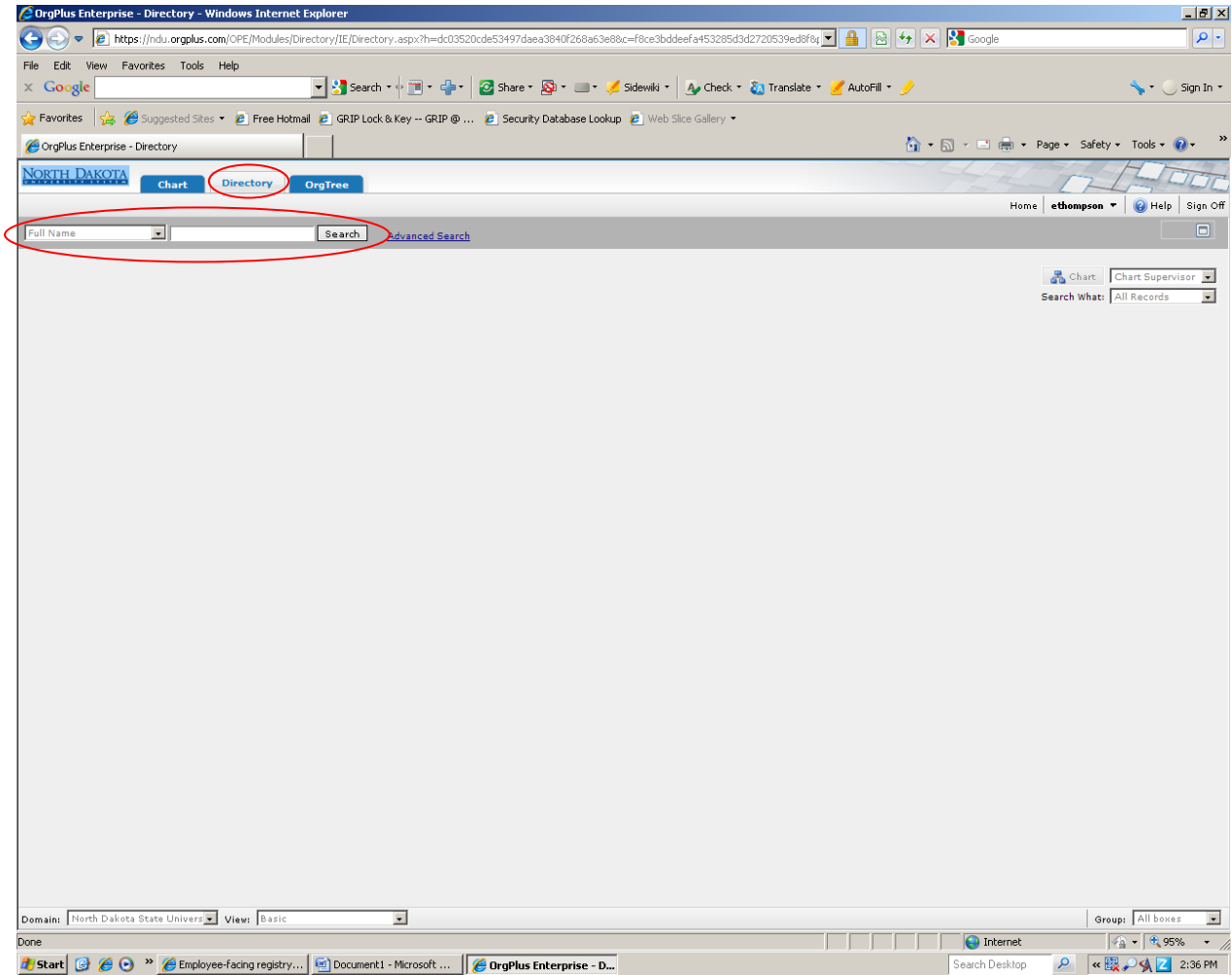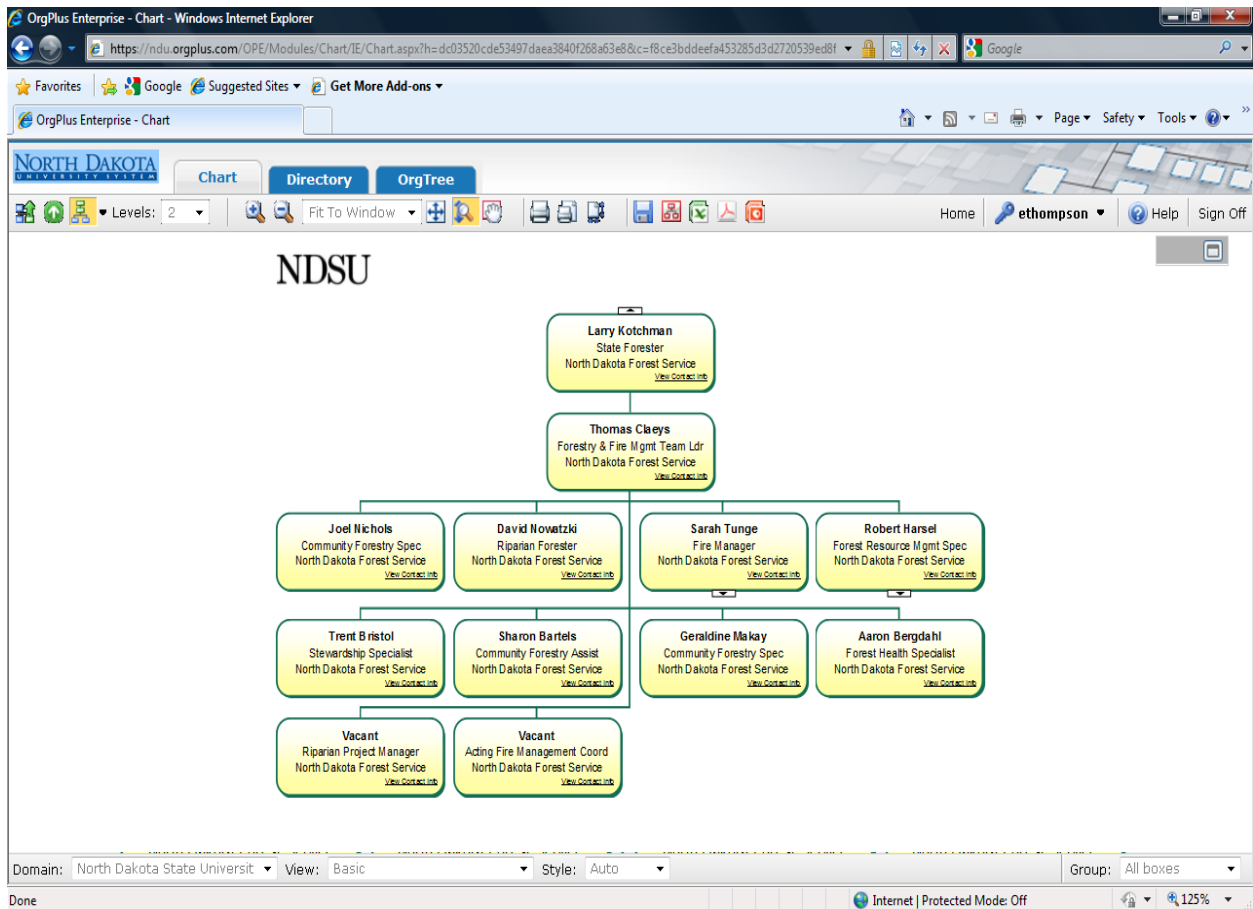
It can give a detailed or overview of the employee information. If you leave the conditions blank, it will bring up everyone in alphabetical order.
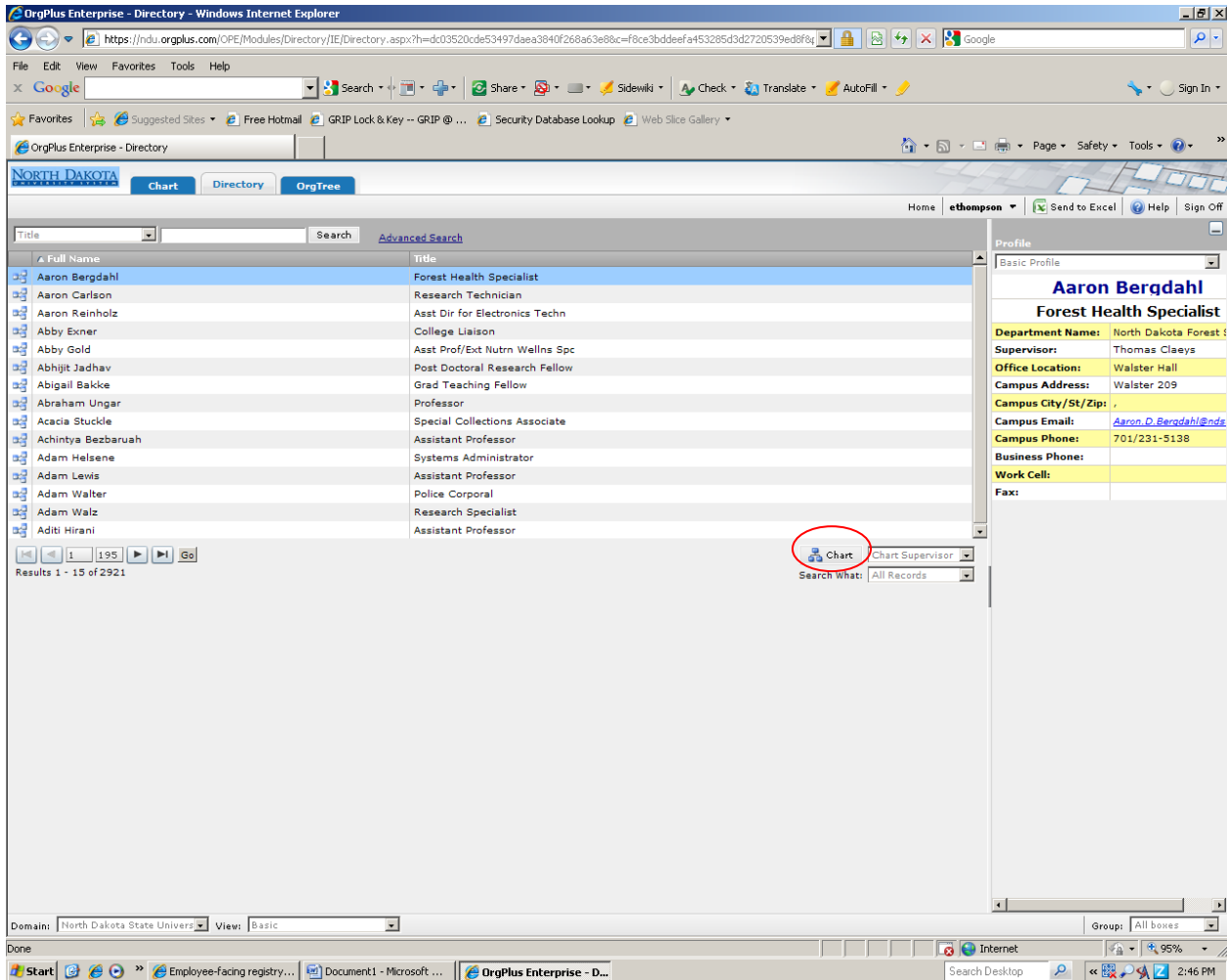

Select the employee you want and then click on the chart button to go back to the chart view.

It moves you back into the chart view, see below:

You can perform a basic search by clicking on the basic button and typing in the criteria. For example, below I have typed in the title "Employment Assistant", which brought up any positions that had Employment Assistant in the title.
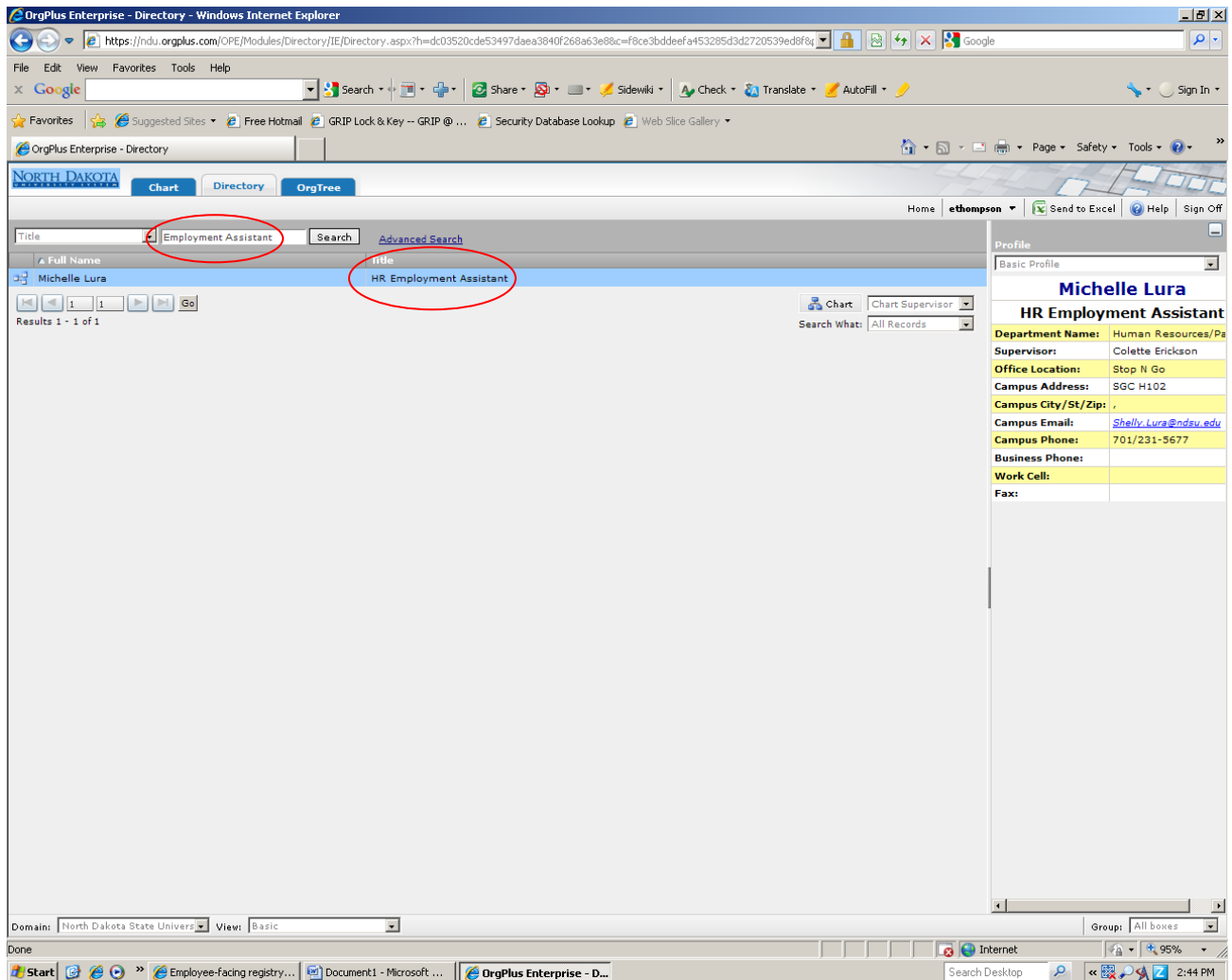
On this screen I performed an advanced search and typed in the title starts with HR for the criteria, you need to click on the Add button and then the Search button and it will then perform the search.
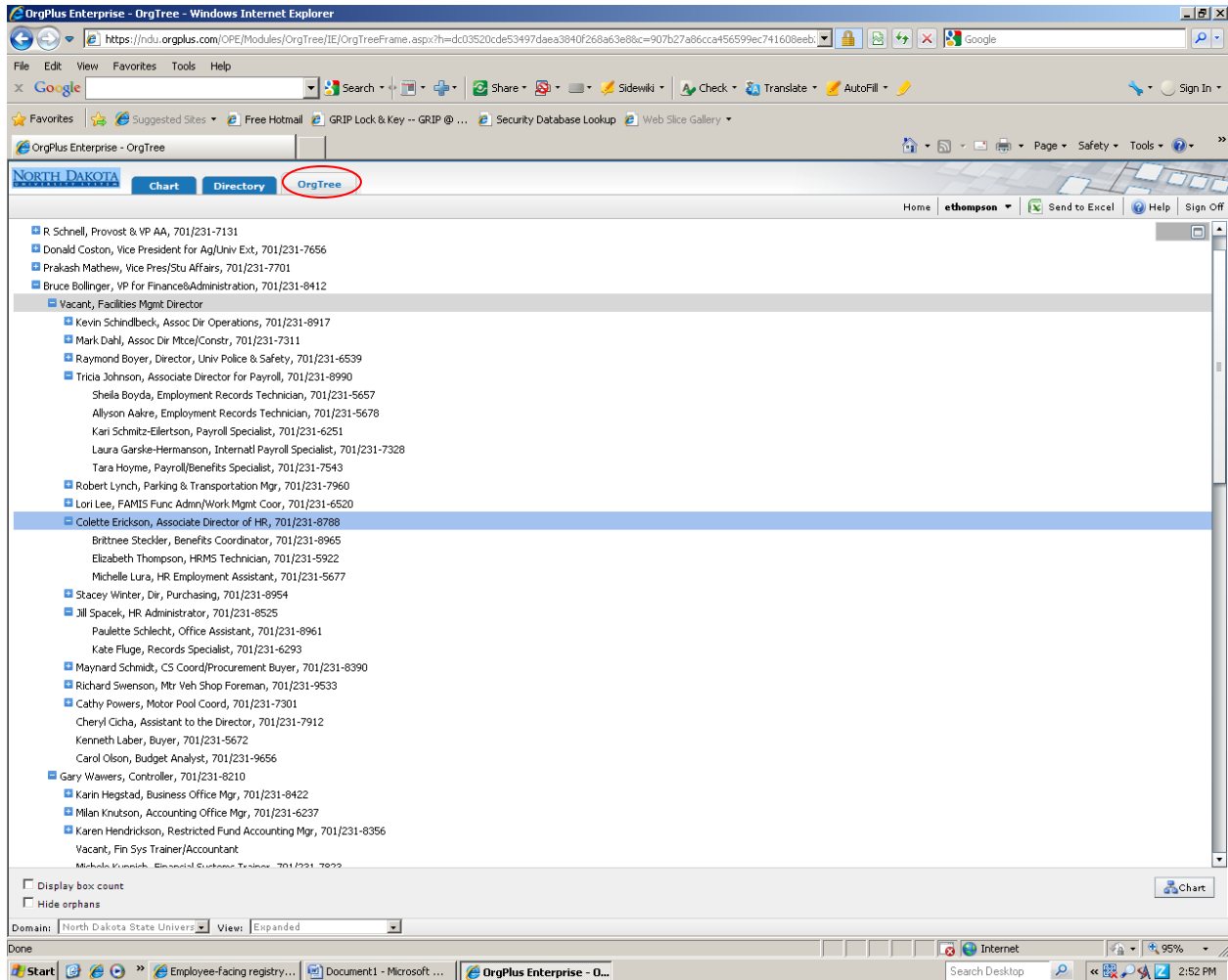
When you click on the OrgTree View it will display the same information in a tree with branches to expand.

This is the expanded view that includes position number, job code, department name, and salary.